



Values-Based Major Giving Academy

Module 5: Agitate with Love

Review Action Learning

- Ask two people money questions
- Complete Cultivation Toolbox Worksheet





What are you proud of?

Values-Based Major Giving

- Identify Supporters
- Choose Donors
- Create the Environment
- Build Trust
- Agitate with Love**
- Make the Ask
- Engage with Gratitude





Challenging Conversations

When you notice a donor's words or actions are out of alignment with their own and/or your organization's values.



Module 5: Agitate with Love

Learning Objectives

After this session, you will be able to:

1. Define loving agitation
2. Use a values-pivot in challenging conversations with donors
3. Strengthen your capacity for challenging conversations



Loving Agitation


Module 5: Lesson 1





Loving Agitation

Loving agitation is a query with a donor about how their stated values align with their actions.



“ We treat donors as partners, and this means that we are transparent, and occasionally have difficult conversations. ”

[CCF Principles - CCF \(communitycentricfundraising.org\)](https://communitycentricfundraising.org)

Donors want to grow.



S·V·A

Values-based Fundraising © 2021 by Staiger Vitelli and Associates LLC is licensed under [Creative Commons](#)



90 Second Pause





The Values Pivot

Module 5: Lesson 2





The Values Pivot

Express Discomfort

Back to Values

Consent to Continue

Get Curious

Avoid Proving them Wrong

Offer Vulnerability

Close on the Future

Express Discomfort

Verbally or non-verbally

*"Hmm. I haven't thought
about it that way before."*



Back to Values

Address the
misalignment

"You mentioned valuing equity when we spoke before, and this seems different."



Consent to Continue

Get donor's agreement

"Would you be ok if I asked you some more questions about this?"



Get Curious

Encourage the donor to share their feelings

“Tell me more about your feelings on this.”



Avoid Proving them Wrong

Taking the conversation into facts moves you further away from values

“Our value of equity doesn’t have an end point until we’ve elevated voices of color to the level that white voices have been elevated. What do you think?”



Offer Vulnerability

Share a personal
experience

"...times when I don't see someone who shares identities with me represented, I wondered if I belonged. Does that resonate with your experience?"



Close on the Future

What's your next step?

"I appreciate our open dialogue. I'll be looking forward to our next conversation! Can I touch base in June for a check in?"





“

The Values Pivot is about fostering understanding, encouraging reflection, and moving the donor a bit closer to understanding the complexity of the work of your organization.

”



90 Second Pause





Framework for Self- Awareness

Module 5: Lesson 3





Framework for Self-Awareness

1. **Notice** when something said in conversation is out of alignment with the organization's or donor's values.
2. **Create space** to respond with curiosity later.
3. **Ask yourself "what"** you need, not "why" the donor said what they said.



Notice

Take note of how a donor's comment feels



Create Space

“I feel like I got to know a lot more about you today. Thanks for being so open. I took a few notes and want to get back to you on the things you shared. Is it ok if we talk again in a couple weeks?”



Ask Yourself What

What do you need to know?

Not: Why did they say that?



To Don'ts

- Pretend you're not bothered
- Know exactly what to say in the moment
- Fix the donor

You get to choose if and how you respond.



Framework for Boundaries

Module 5: Lesson 4



Boundaries

Get clear about:

- Your role with donors
- Your goal for engaging with donors
- What it takes for you to stay whole



Your Role



Your Goal



Staying Whole



Framework for Boundaries



Values-Based Major Giving Academy

What's your role with donors? How will you know you're staying within your role?

Reflect on times when have you may have ventured outside your role? What did you notice?

A large, empty light blue rectangular box intended for handwritten or typed notes.

What signs can you spot to tell you you're outside your role?

Supervisors and Team Leaders

Work with your team to develop a list of team boundaries.





Agitate with Love

Module 3: Review





A-ha!



Hmm...



Whew!

Action Learning

- Send yourself three love notes for May 18, June 1, and June 20
- Role-Goal-Whole worksheet
- Supervisor Bonus: Develop team boundaries





Congratulations!

How does it feel to have completed Module 5,
Agitate with Love?

You're one-step closer to becoming a
Values-Based Major Giving Specialist.